

STAFF TRAINING FOR INDIVIDUAL TAX RETURNS

This course is designed for practitioners with minimal or no tax experience to prepare complete tax returns by illustrating the process with filled in tax forms.

Learning Objectives:

Upon completion of this course, you will be able to:

- Gain a working knowledge of the federal taxation and the individual tax return preparation process.
- Enable neophyte practitioners to see the "big picture" for individual return preparation.
- Apply key tax return concepts using filled in forms and numerous practice aids.

Major Subjects:

- Preparation of individual returns with a focus on:
 - Wage earners
 - Capital gain and loss gross income
 - Schedule A deductions
 - Schedule E income
 - Schedule D gains
 - New Affordable Care Act Forms 8962 and 8965
- Tax structure and tax determination
- Gross income
- Itemized deductions: personal use activity
- Itemized deductions: employment and investment related expenses
- Deductions for AGI and Schedule E
- Special tax computation
- Credits

Designed for:

Tax return preparers with little or no experience and practitioners seeking an update on basic tax preparation for individual returns.

Level of Knowledge

Basic

Field of Study

Taxes

Format

Group Live

Prerequisite

None

Advanced Preparation

None

Recommended CPE Credit

8 Hours (Live)
2-4 Hours (Webinar)

Available

December 1, 2016

Designed for new staff persons heading into their first or second tax season or for those looking for a refresher in tax return preparation